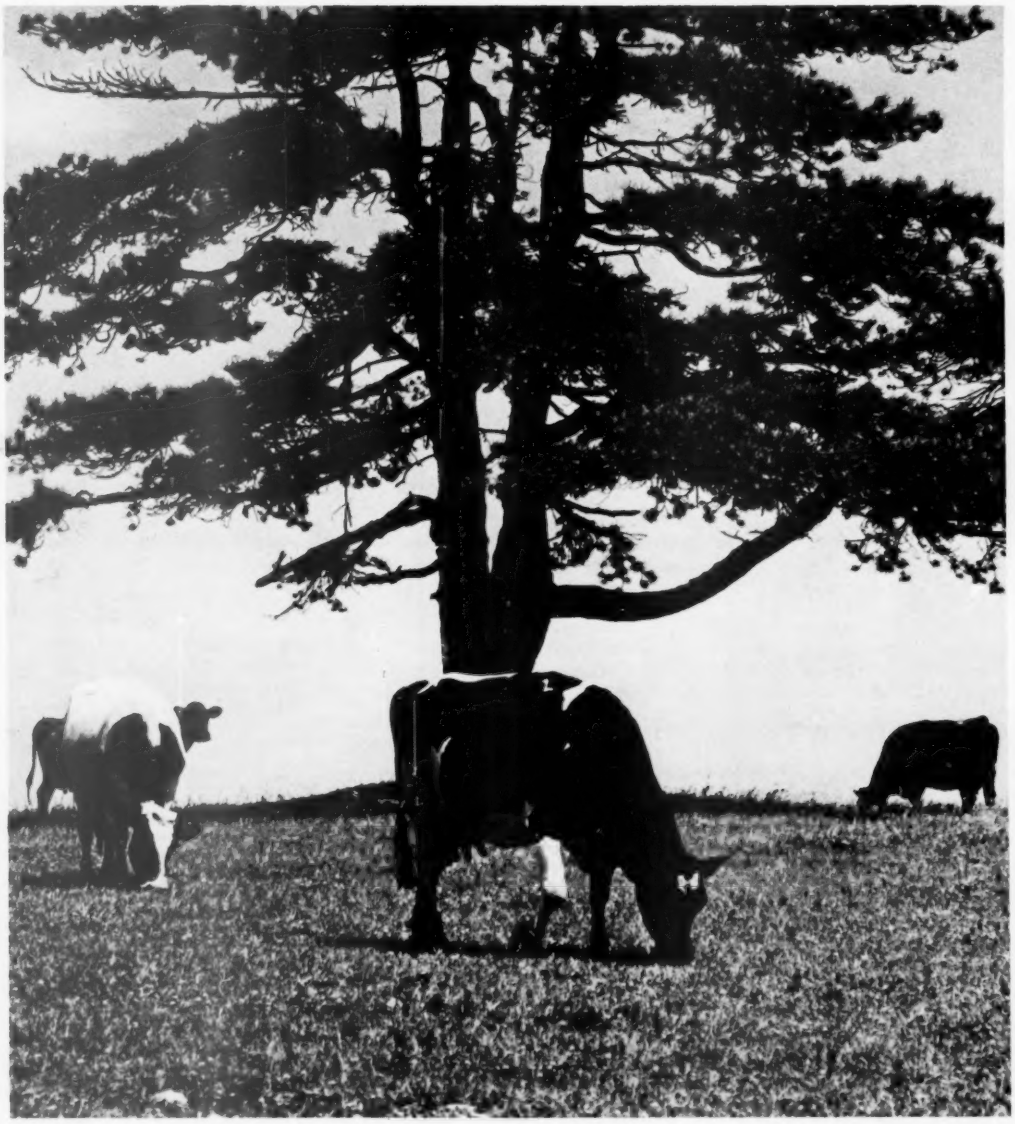
FOREIGN AGRICULTURE



JANUARY 1, 1973

Canadian Farmers Expect Happy New Year

World Tea Trade

FOREIGN AGRICULTURAL SERVICE
U.S. DEPARTMENT OF AGRICULTURE

FOREIGN AGRICULTURE

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This week's cover:

Holsteins graze peacefully in central Ontario. Speakers at the recent Canadian Outlook Conference predicted that Canada's milk production will rise in 1973, as will output of butter and cheese. The outlook for this and other Canadian farm products begins on page 4.

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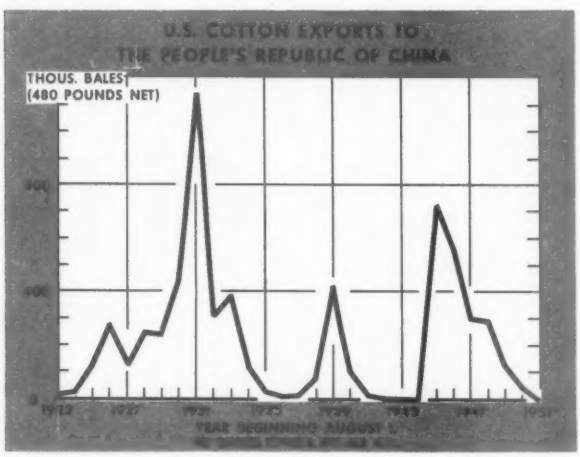
There is growing interest in selling U.S. agricultural products to the People's Republic of China. In past years the United States was an important supplier of cotton to the PRC. As China's imports rise, what is the potential for U.S. sales?

COTTON EXPORTS TO THE PEOPLE'S REPUBLIC OF CHINA

[In thousands of bales, 480 lb. net]

Source	Average 1960-64	Year beginning Aug. 1 1966	1967	1968	1969	1970	1971
Brazil	1	0	0	0	2	0	[1] 0
Egypt	84	93	40	30	46	71	78
Iran	1	18	10	3	1	10	[2] 33
Kenya	6	3	5	3	5	8	12
Mexico	15	0	0	0	0	0	[1] 73
Morocco	6	0	0	0	0	12	10
Pakistan	102	140	88	102	49	51	83
Sudan	49	64	41	69	53	151	[3] 114
Syria	116	90	54	64	110	73	69
Tanzania	27	60	49	25	63	50	[3] 68
Turkey	2	4	7	2	7	0	49
Uganda	56	17	30	7	20	4	24
Other	0	5	8	0	1	3	(*)
Total	465	494	332	305	357	433	613

[1] August-May. [2] August-March. [3] August-June. [4] Less than 500 bales.



Cotton Imports by the People's Republic of China: An Assessment

By MARY E. CHAVES
Cotton Division
Foreign Agricultural Service

In recent years, the People's Republic of China has increased its purchases of cotton from overseas sources. Because of the improvement in China's relations with the United States, speculation has arisen about the further development of this trade.

Chinese cotton imports have varied dramatically in the recent past, rising from a low of about 305,000 bales (480 lb. net) in 1968-69 (August-July crop year) to at least 613,000 bales in 1971-72.[1] China has also expanded its sources of supply by adding new countries to its list of traditional major suppliers (Egypt, Pakistan, Sudan, Syria, Tanzania), and by taking larger imports from Iran, Mexico, Morocco, and Turkey.

In 1947, when China produced only slightly more than 2 million bales of cotton, Chinese cotton imports reached almost 800,000 bales, including more than 300,000 from the United States.

While official Chinese statistics are not available, information from various sources indicates that China's cotton production and consumption have grown sharply since 1947. Production is now placed at 7.5 million to 7.7 million bales annually and consumption at about 8 million bales.

Cotton imports have varied widely in the ensuing period, falling to around 200,000 bales in 1953-54 and 1961-62 and reaching a peak of nearly 800,000 in 1963-64. Today, in spite of its position as the world's third largest cotton-producing country, China is still a cotton-importing nation.

Both domestic production levels and consumption priorities have had an impact on China's cotton imports during the past decade. In the late 1950's and early 1960's, when land was diverted away from cotton and other industrial crops into food production, cotton acreage dropped from about 14 million acres in 1958 to less than 8.5 million in 1962. Cotton production suffered as a consequence, falling as low as 4.1 million bales in 1961-62. Imports averaged around 300,000 bales annually during the period 1958-62. As a result, consumption probably dropped to around 4.5 million bales in 1962-63 from an estimated 7.8 million bales in 1958.

By the mid-1960's additional land was again planted to cotton and since 1964-65 acreage has amounted to more than 11 million acres annually, according to estimates by USDA's Economic Research Service. Production averaged 7.4 million bales during the period 1964-70. Imports declined from around 800,000 bales in 1963-64 to around 300,000 annually in 1967-68 and 1968-69.

A second reversal in import trends appears to have occurred in 1969-70 as exporting countries shipped about 357,000 bales of cotton to China. These shipments were stepped up to 433,000 bales in 1970-71, and incomplete data indicate they reached 613,000 bales of cotton in 1971-72.

China's main cotton suppliers in the past have been Pakistan (short-staple cotton), Syria (longer staple Upland), and Egypt and Sudan (extra-long staple cotton). Since 1966-67 an average of 49,000 bales has been imported annually from Tanzania and some from Uganda.

For the first time since the early 1960's, China bought cotton from Mexico in 1971-72 (73,000 bales through May) and imports from Turkey were substantially higher than the 5,000-bale average of recent years (49,000 bales for the August-July season).

Imports from Iran have also increased sharply in the past 2 years from 1,000 bales in 1969-70 to 33,000 for the first 8 months of 1971-72. All indications point to the continuation of this trend in 1972-73. In late September 1972 trade sources reported that China had purchased approximately 55,000 bales of Iranian cotton to be shipped near the end of 1972. China's purchases from Morocco, which declined to zero in the late 1960's, have rebounded to 10,000 and 12,000 bales during the past two seasons—double the average of the early 1960's.

A November report from trade sources indicates that China had bought 46,000 bales from Colombia for early shipment.

The United States used to provide substantial quantities of cotton to China, especially in the early 1930's and the late 1940's. From 1923-24 through 1950-51 China received an average of 222,000 bales of U.S. cotton each year —with amounts varying from zero during 1942-44 to a high of 1.1 million in 1931. No cotton has been shipped from the United States to the People's Republic of China since 1950-51.

It is not possible to predict at this point whether purchases of U.S. cotton may be renewed as the political thaw in U.S.-Chinese relations continues. At least the possibility cannot be excluded. Developments in 1972-73 may provide better indications of whether the Chinese cotton import market will expand further in a manner to permit U.S. cotton exports to join those of other countries en route to China.

[1] These data are based on export statistics from cotton exporting countries for the August-July crop year.

HAPPY NEW YEAR FORECAST AT CANADIAN OUTLOOK CONFERENCE

By EUGENE T. OLSON
U.S. Agricultural Attaché
Ottawa

THE 1973 OUTLOOK for Canadian agriculture—supply, demand, and prices—may be the most optimistic since Outlook Conferences began 33 years ago. This cheerful projection was made by S. B. Williams, Canada's Deputy Minister of Agriculture, and Chairman of the 33d Annual Canadian Agricultural Outlook Conference, November 20 and 21, in Ottawa.

Analysts who presented farm situation and outlook reports to over 350 conferees foresaw generally higher prices for Canada's wheat, feedgrains, and oilseeds, and envisioned stability for other commodities in 1973. In addition, Canada's farmers were told that they could expect a record realized net income of Can$2 billion in 1972, compared to the previous record of $1.7 billion in 1966.

In 1973, net farm income is predicted to decline slightly to about $1.9 billion. Further gains in farm receipts are expected from 1973 sales of livestock and livestock products. Receipts from crops may decline somewhat, keeping total farm receipts close to the 1972 level, while farm expenditures are continuing their upward trend.

In addition to these generally optimistic projections, Outlook speakers stressed the basic theme of the Conference, "Market Development and Expansion." Continuation of present trends, they agreed, will necessitate ongoing market development, planning, cooperation, and hard work by all segments of agriculture.

While speakers emphasized opportunities in the home market, most acknowledged its limited growth potential and suggested that export markets be carefully studied, developed, penetrated, and exploited to provide growth and expansion for Canadian agriculture.

Government analysts cautioned Canada's grain growers against undue optimism that record wheat exports would continue in 1973-74. Excessive wheat production could cause surpluses, disrupting the Government's long-term efforts to balance production of foodgrains, feedgrains, oilseeds, and livestock.

Speakers from the Economics Branch of the Canadian Department of Agriculture repeatedly warned that healthy export trade depends not on one large sale, but rather on steady supply and market promotion of farm commodities, particularly those for which Canada has an above-average competitive advantage.

In pinpointing commodities where Canada has trade advantages, economists compared average Canadian farm prices in 1966-70 with prices received by farmers in other major agricultural-producing countries where farm products comprise a significant proportion of export sales.

Conclusions indicated strong comparative price positions for barley, rye, rapeseed, wheat, oats, corn, soybeans, cattle, hogs, potatoes, and tobacco.

MIDLEVEL COMPARATIVE price positions—where Canadian producer prices are somewhat higher than the lowest price received by other countries—included flaxseed, milk, and apples.

Weak competitive prices were noted for broilers and turkeys.

Conclusions presented at the Conference showed that over the years Canadian farmers have had a good competitive advantage in marketing 12 out of 17 major commodities, and an average advantage for three more.

Reviewing the 1972 situation and the 1973 outlook for Canada's major farm commodities, Conference analysts presented their views as follows:

Wheat. The outlook for wheat was called the best in years. Export sales could be up almost 100 million bushels over last season.

In keeping with high world wheat prices, Canadian prices rose in August and September 1972, and are expected to continue at levels well above those of recent years.

Canada's 1972-73 wheat production, revised upward since the Conference, is estimated at 533.3 million bushels, 3.7 million more than in 1971. With stocks down, total supplies have declined by more than 150 million bushels. Because of the early snow, there will be more low-grade wheat than normal from the 1972 harvest. The high price of wheat could result in less being used for feed, particularly if lower grades can be exported.

Declining for the third straight year, wheat supplies—stocks plus production estimates—fell sharply in 1972 to 1.12 billion bushels from 1.27 billion in 1971. Total disposition of wheat in 1973 could be about 700-750 million bushels, reducing stocks by July to less than 400 million bushels.

Canadian wheat acreage in 1972, at 20.9 million acres, was 1.9 million more than 1971, but yields dropped from 27.3 to 24.6 bushels per acre.

Feedgrains. As a result of the strengthened international feedgrains market—reflecting unusual world demand for grain—Outlook speakers projected that prices, which have risen substantially, will remain at these higher levels for some time.

Total Canadian feedgrain production in 1971-72 amounted to 22.4 million tons, down 15 percent from the 1970-71 record crop. Feedgrain consumption in Canada in 1972-73 may approximate that of the previous year. Although cattle and poultry utilization will be higher, increases in the hog population will not occur before the 1973-74 crop year.

Exports of barley reached a record 230 million bushels in 1971-72, but are expected to decline to a possible 150 million bushels in 1973, due principally to production decreases of 83 million bushels this season.

Oat exports in 1971-72 declined by about 3 million bushels to total 10.5 million. Exports are unlikely to increase in 1973-74; prices will probably be higher than those of last season.

Canadian corn production totaled 104.6 million bushels, a drop of 11.4 million from 1971. With normal planting weather, however, production growth will probably resume during the coming season.

Canadian corn (top) awaits transfer to ship at Fort William. Tobacco acreage (above) rose for the first time since 1967. In 1973, broiler output (right) is expected to remain high.

Canada's imports of corn, all from the United States, dropped to 11 million bushels in 1971-72, and in the near future are not likely to return to the levels of 30 or more million bushels of a few years ago. However, imports from the United States in 1972-73 are currently projected at approximately 22 million bushels.

Oilseeds. Outlook reports suggest that prices for Canadian oilseeds may strengthen. Rapeseed prices have risen since the beginning of the crop year and will probably average higher in 1972-73 than the previous year, despite the overall lower prices expected for edible oils in 1972-73. Canadian farm prices of soybeans are expected to follow the same rising trend anticipated for the farm price of U.S. soybeans.

So far, exports of rapeseed are substantially higher than in the same period a year ago, and if continued, will reach about 52 million bushels. With expanded crushing capacity, the domestic rapeseed crush could reach 14 million bushels. In this case, utilization of rapeseed would total 66 million bushels, leading to a carryover of less than 23 million bushels on a cleaned basis.

Partly because of poor weather conditions, rapeseed production in 1972 was down by 40 percent to 57.3 million bushels, with a larger than usual percentage of poor quality seed.

Canadian rapeseed acreage dropped sharply to 3.3 million acres in 1972 from 5.3 million in 1971. In view of the carryover stocks projected for July 1973, some increase in rapeseed acreage will be necessary if Canada is to maintain exports at present levels.

Canada may also encounter difficulties in maintaining exports of soybean oil and meal at current levels, since Britain's entry into the European Community will eliminate Canada's Commonwealth preference. In addition, soybean products will face increasing competition from rapeseed products, especially oil. These factors could result in reduced imports of soybeans and soybean products from the United States.

Soybean production in 1972 is estimated at 11.7 million bushels. Acreage increased in 1972 to 405,000 acres.

Sunflowerseed yields are likely to increase substantially and returns to growers to rise slightly, although acreage is down.

Similarly, flax prices may be higher. Supplies will probably decline at the end of the crop year. Increases will be

Thousands of Canadian sheep graze on a ranch in British Columbia.

needed in flaxseed acreage in 1973 if Canada is to sustain present exports.

Seeds. Outlook papers forecast that supplies of most cereal and oilseed varieties will be adequate to meet domestic demands in 1973, as will supplies of most of the principal forage crops. Also, retail prices for most forage seeds will rise in 1973. The continuing demand in Europe and Japan for certified seed of adapted varieties may lead to expanded acreage for those seeds in western Canada, under the Seed Certification Scheme.

Livestock. Beef production, according to Outlook papers, is slated to continue increasing moderately in Canada and prices in 1973 will average at or above 1972 levels. Feed costs will be somewhat higher, compared to last year.

In 1973, calf slaughter will continue its downward trend, reflecting a continued strong demand for cattle feeding in eastern Canada, as well as a smaller supply of dairy calves. Veal calf prices, which have increased sharply since 1965, will remain high throughout 1973.

Hog marketings during the first half of 1973 will probably not reach 1972 levels for the same period, but marketings during the last half of 1973 are projected to top 1972 last-half totals. Lower hog prices and somewhat higher feed prices are anticipated.

With strong consumer demand for red meats in 1973, lamb prices will probably average at high levels, reflecting the generally high prices of beef and pork. Wool prices rose sharply in 1972 from previous lows in 1971, and should remain strong into 1973.

Poultry and eggs. Marketing boards established across Canada may be effective in stabilizing prices for poultry and eggs at all levels.

To combat low prices from overproduction, Canada's Department of Agriculture has advised minimal increases in broiler production this year. The Canadian Turkey Coordinating Committee, however, plans to increase total turkey production in 1973 to 210 million pounds, about 13 percent over 1972 allocations and 6 percent above expected 1972 marketings.

At the present rate of increase in laying stock, and with increased production per bird reported, egg production may again become excessive. In the first 3 months of 1973, the volume of eggs marketed through registered stations will reach about the same levels as in 1972. Concurrent with the Outlook Conference, an agreement was signed in Ottawa for the establishment of a national egg marketing agency which will also control output through provincial boards.

Dairy. Canadian milk production, according to Outlook reports, may climb by about 3 percent in 1973, topping 1972's 18.2 billion pounds. However, increases in feed costs and other farm inputs, particularly labor, may limit increases in net income.

Cheddar cheese production and consumption may show a modest increase. Canadian specialty cheeses are likely to gain a larger share of the growing Canadian market.

Milk used in ice cream mix will probably be up about 2.5 percent in 1973, although this increase will be largely offset by a decrease in milk used for concentrated whole milk products.

PRICES FOR skim milk powder in 1973 are likely to be lower than during the first half of 1972, and skim milk powder may require export assistance.

Creamery butter production in 1972 increased about 7 percent over 1971 —to about 307 million pounds—assuming that milk was diverted from cheese production to butter in the last quarter of the year. Butter output is expected to rise in 1973 and should balance consumption.

Domestic consumption of creamery butter is estimated at 324 million pounds, down 2 percent from 1971. Butter stocks on January 1 will also be down from 1971 levels.

Fruits and vegetables. The volume of apple imports should remain similar to that of last season, while apple exports in the 1972-73 marketing season may increase slightly to Britain and other overseas markets. The domestic market, though limited, will continue to be a good one for Canadian-produced apples.

Prices for tender tree fruit—apricots, cherries, peaches, pears, and plums/prunes—will average higher in 1972-73 than the previous year, and moderate production increases are forecast for 1973.

Grape production will increase over the next few years, although the volume of varieties produced may shift. Raspberry and strawberry production are both expected to mount in 1973.

Canada's vegetable production will probably be well below that of 1971. Supplies of storage crops will be moderate to low, while demand and prices should rise. Although North American potato supplies are forecast to decline, demand for seed potatoes on the world market should be exceptionally good.

Tobacco. Total sales of domestically-produced cigarettes are projected to rise 2 percent in 1972 and again in 1973, say Outlook reports. In view of this year's weather-reduced production, a somewhat larger flue-cured tobacco crop

(Continued on page 16)

World Tea Prices Fall As Supplies Expand—Exports May Set Record

By REX E. T. DULL
Sugar and Tropical Products Division
Foreign Agricultural Service

Dry tea leaves are cleaned in Sri Lanka (Ceylon) tea factory.

WORLD TEA SUPPLIES are expected to increase to record levels in 1972, but prices are declining as production outpaces consumption. World tea exports are also anticipated to be at an alltime high.

Tea production in 1972—excluding Mainland China—is forecast at 1.15 million metric tons, up about 3.5 percent over the bumper 1971 harvest of 1.11 million tons.

Record 1972 crops and large outturns of recent years are the result of higher yields from existing tea areas, plus a rapid expansion of tea acreage in Africa and South America. Replanting programs, together with higher yielding plant varieties and increased fertilization, have strengthened the production potential of most tea producing countries.

But tea prices have been trending downward and producer-country foreign exchange earnings from tea exports have failed to increase.

Countries most concerned with the world tea situation are India and Sri Lanka (Ceylon), which produce over one-half of the crop and account for two-thirds of world exports; and the United Kingdom and the United States, which account for one-half of world imports.

Tea is often consumed in large quantities by the producing countries themselves. India now utilizes over one-half of its production and has edged out the United Kingdom as the world's largest tea consumer. In fact, India's internal demand has risen so rapidly in recent years that the volume available for export is in danger of declining, despite increasing production.

Other countries where domestic consumption absorbs much of the output are Japan, Iran, the USSR, and the People's Republic of China.

The larger world tea harvest has been aided by the resumption of production in Bangladesh (formerly East Pakistan), following the fighting in 1971 when the crop totaled only about one-third of its normal level. Expanding production in new tea producing countries, such as Ecuador, New Guinea, and South Africa, has also added to supplies.

MORE IMPORTANT has been the phenomenal growth of the African tea industry, mainly in Kenya, Malawi, Mozambique, Tanzania, Uganda, and Zaire. Bolstered by lower production costs and taxes than in Asian tea producing countries, African growers are continuing to increase plantings. Africa now accounts for over 10 percent of the world crop, compared with 6 percent in 1960, and only 4 percent in 1955. African production in 1972 is expected to be a record 138,000 tons, well above the 118,000-ton crop produced in 1971.

Whereas most Asian producers have seen their foreign exchange earnings from tea decline over the years, the African tea industry has been able to increase export earnings. The value of African tea exports in 1970 was a record $88 million, more than double the 1960 level of $40 million. On the other hand, India's tea export earnings in 1970 amounted to $198 million, down from $252 million in 1960. Sri Lanka's sales also fell during the same period, amounting to $188 million in 1970, compared with $230 million in 1960.

Both India's and Sri Lanka's export earnings improved somewhat in 1971, rising to $214 million and $192 million, respectively. African export earnings from tea in 1971 were estimated at $85 million, off slightly from the record 1970 level as drought conditions reduced supplies available for shipment.

The declining trend in world tea prices over the years is attributed to production rising at a faster rate than consumption. In addition, larger supplies of low- and medium-quality teas have helped to pull prices down.

London auction prices for all teas averaged 55.2 cents per pound in 1960, declined to a 50.1-cent average in 1965, and fell further to an average of 44.1

cents in 1969. Prices recovered to 49.7 cents during 1970, but again trended downward in 1971, averaging 47.1 cents. Prices in 1972 continued to fall and during the first 10 months averaged slightly over 45 cents per pound.

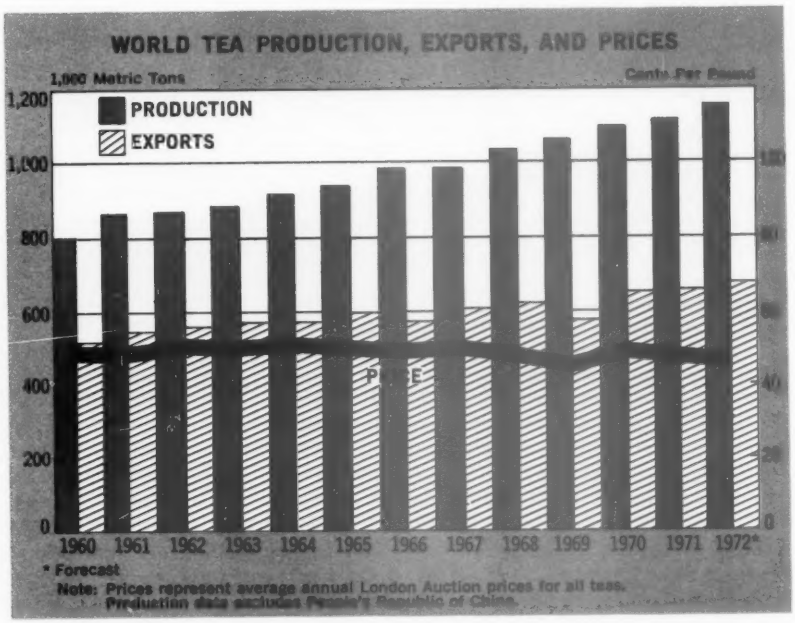
Further adding to grower woes have been rising production costs and inflationary pressures. As export earnings lag behind the growth in volume, many producer governments are increasing their efforts to conclude an international tea agreement.

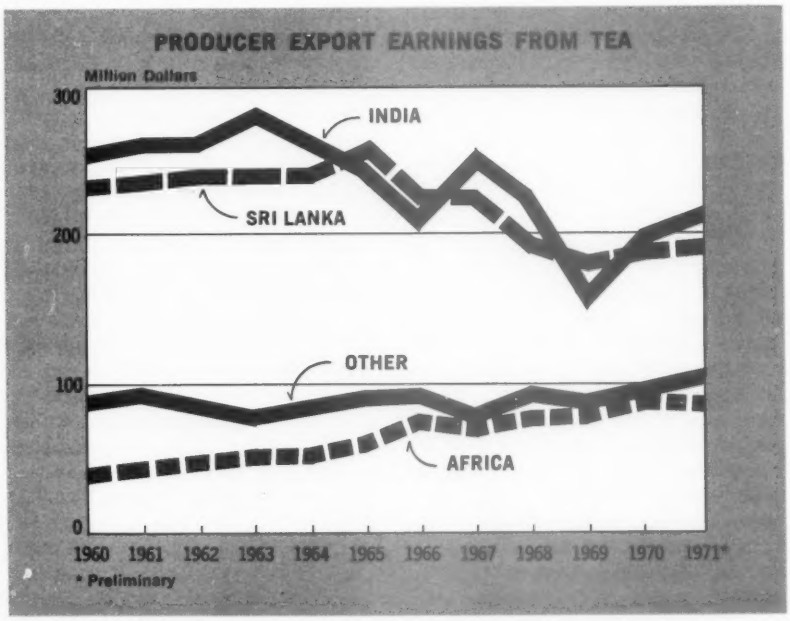
The Food and Agriculture Organization of the United Nations (FAO) and the United Nations Conference on Trade and Development (UNCTAD) are studying the problems of the world tea economy. Several international meetings, under U.N. auspices, between producers and consumers have been held, but no significant progress toward a world tea agreement has been made.

Producing countries, at a meeting in Mauritius in July 1969, agreed on export quota arrangements to limit the shipment of black tea as a stopgap measure to stem the fall in tea prices. The quotas were implemented on January 1, 1970, and were set at 594,800 metric tons during the first year of operation. Quotas were set at the same level for 1971, but later in the year were changed to 727,600 tons, as the quota-year was extended to cover a 15-month period ending March 31, 1972. The quota-year was then set on an April-March basis to more closely coincide with the Indian harvest season.

At a recent FAO-sponsored meeting of tea producing countries in September 1972, export quotas were set at 619,000 tons for the 12 months ending March 31, 1973. In addition, provisional quotas were agreed upon for 1973-74 (645,000 tons) and 1974-75 (670,000 tons).

Allocations of export quotas have thus far been so liberal that they have had no appreciable impact on tea prices. Several African producing countries have shown little interest in entering into an international tea agreement, at least not until they have completed their tea expansion programs and have a larger share of the world market.





THE DEVELOPMENT of new markets, as well as expanding traditional ones, has been advocated to increase consumption and strengthen prices. Much of the rise in world tea consumption in recent years has been by the producing countries themselves.

Consumption in the United Kingdom has leveled off and potential for expansion appears slight. Actually U.K. tea consumption may be declining, due to increased competition from other beverages and to the increasing use of tea bags. Although tea bags are more expensive to the consumer, they use less tea by making one tea bag do the work of several teaspoons of loose tea.

Tea bags accounted for 16 percent of the U.K. market in 1971 and are projected to capture a 50-percent share by 1980, resulting in an estimated loss of nearly 14,000 tons in consumption.

However, U.S. consumption has been undergoing an expansionary trend, reaching a record level in 1971. Tea sales by U.S. retail stores in 1971 were placed at 130 million pounds valued at over $330 million, up from 1965 sales

(Continued on page 16)

Edible Oil Shortage Looms In India, Purchases Due

India's supply of edible vegetable oils is expected to fall far below domestic needs in 1972-73, due to a short peanut crop. Supplementary purchases of oilseeds and oils seem imminent, to prevent sharp declines in per capita consumption.

According to trade sources in India, vegetable oil imports authorized by the Government could total 200,000 metric tons, which would offset only 45 percent of the expected shortfall. Further, no appreciable stocks of either oilseeds or oils are available for 1972-73.

This season, peanut oil availability is expected to decrease by 400,000 tons. With production and imports at estimated levels, consumption of edible oils and fats may decline to 11.2 pounds per person, compared to 12.8 pounds in 1971-72.

Peanut production in India is currently estimated at only 4.3 million tons —down 25 percent from last season's moderate outturn of 5.7 million tons and 30 percent below the record 6.1 million tons harvested in 1970-71.

Monsoon rainfall this season was late and insufficient over most of India, causing drought and reducing production of peanuts and other oilseeds, including sesameseed and castorseed. Also, acreage planted to peanuts and sesameseed declined by about 1 to 2 percent from the area planted in 1971-72.

India's hopes are now centered on the winter-growing oilseed crops—particularly rapeseed and mustardseed—as well as flaxseed and safflowerseed. Tentatively, the rapeseed and mustardseed crop is forecast at 1.8 million tons, an increase of 15 percent over last season's below-normal crop of 1.57 million tons. However, no rapeseed stocks are available this season, compared with 250,000-ton stocks in 1971-72. Rapeseed imports are estimated at about 100,000 tons—the same as in 1971-72.

Rapeseed oil production, estimated at 573,000 tons, is expected to decline about 15,000 tons from the 586,000 tons produced in 1971-72. Expectations are that a possible 25,000 tons of rapeseed oil will be imported to offset this decline.

Total edible oils and fats available for domestic consumption are forecast at 2.93 million tons—down nearly 320,000 tons from the 3.25 million on hand in 1971-72. Therefore, cash purchases of soybean oil and palm oil, as well as imports of rapeseed and oil, seem inevitable during the 1972-73 year.

If additional palm oil is imported this year, per capital use of inedible oil will remain at .66 pounds, the same as in 1971-72. Therefore, domestic consumption of both edible and inedible oils and fats would average 11.9 pounds per person compared with 13.4 pounds in 1971-72. —By ELLEN V. MCGUIRE

Fats and Oils Division
Foreign Agricultural Service

INDIA: PER CAPITA CONSUMPTION OF FATS AND OILS[1]

[In pounds]

Kind	1971-72	1972-73
Edible oils	10.5	9.0
Edible oils and fats	12.8	11.2
Edible and inedible oils and fats	13.4	11.9

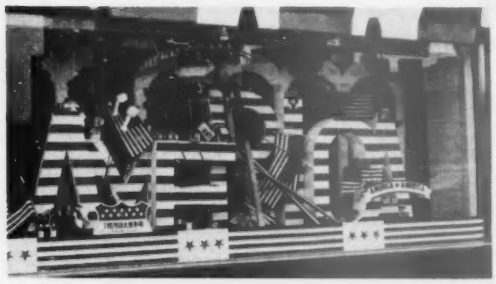
[1] Based on 560.0 million persons in 1971-72 and 573.4 million in 1972-73.

INDIA: SUPPLY AND DISTRIBUTION OF SPECIFIED OILS AND FATS

[In thousands of metric tons]

Kind	1971-72					1972-73[1]				
	Production	Imports	Total	Exports	Domestic consumption	Production	Imports	Total	Exports	Domestic consumption
Peanut	1,454	0	1,454	(2)	1,454	1,001	0	1,001	0	1,001
Sesame	148	0	148	(2)	148	129	0	129	0	129
Rapeseed and mustard[3]	586	(2)	586	1	585	573	25	598	0	598
Coconut	225	0	225	(2)	225	232	0	232	0	232
Cottonseed	150	0	150	0	150	165	0	165	0	165
Safflower	53	0	53	0	53	53	0	53	0	53
Soybean	0	55	55	0	55	0	175	175	0	175
Butter	120	0	120	(2)	120	120	0	120	0	120
Ghee	460	0	460	(2)	460	460	0	460	0	460
Total edible	3,196	55	3,251	1	3,250	2,733	200	2,933	0	2,933
Linseed	136	(2)	136	0	136	130	0	130	0	130
Castor	50	0	50	30	20	52	0	52	30	22
Palm	0	8	8	0	8	0	20	20	0	20
Total inedible	186	8	194	30	164	182	20	202	30	172
Total	3,382	63	3,445	31	3,414	2,915	220	3,135	30	3,105

[1] Forecast. [2] Less than 500 tons. [3] Includes oil produced from imported rapeseed of 100,000 tons each year.



Japanese consumers are drawn to main Seibu store by window display, below, and "Miss Indian 1972," seen at right greeting Robert S. Ingersoll, U.S. Ambassador to Japan.

U.S. Foods Score at Tokyo Supermarket Promotion

Enticed by exhibits of America past and present, some 8 million to 9 million Japanese consumers turned out this past October to examine, sample, and buy U.S. foods and consumer goods at a far-reaching point-of-purchase promotion in Tokyo and environs.

The promotion—sponsored by the U.S. Departments of Agriculture and Commerce, their industry cooperators, and the Seiyu and Seibu retail chains —was carried on simultaneously in 92 Seiyu supermarkets and 10 Seibu department stores from October 6 to 11.

Center of the activities was Seibu's main store, Ikebukuro, which featured such wide-ranging displays and events as an Indian show and western carnival, exhibits of a lunar jeep and space-station model, a modern art exhibit, and a champagne reception using the same type of California champagne President Nixon took with him to Peking.

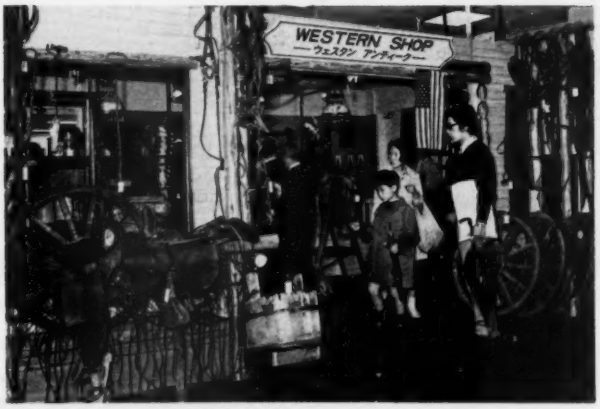
From popcorn to margarine and canned spaghetti, the promotion boosted a number of foods never before purchased by the stores, with sales of such new products totaling up to $300,000. An additional $200,000 worth of well-known items brought the sales tally for the event to around $500,000, for a fivefold gain over the stores' normal purchases.

Number of visitors to the stores increased by an estimated 20 percent during the festivities.

FAS cooperator groups participating in the promotion were California-Arizona Citrus League, California Almond Growers' Exchange, California Raisin Advisory Board, and the Poultry and Egg Institute of America.

Above and below, some of the exhibit and sales areas provided at the main Seibu store for U.S. industry groups cooperating with FAS in sponsoring the promotion.

Left and below, Statue of Liberty and stars and stripes decorate the outside of main Seibu store and western and Indian exhibits, the inside.



Throngs of Japanese consumers, above, move through main aisle of Seibu's Ikebukuro store, with its rows of booths featuring American foods. Below, the Dunkin Donut booth.

Above, American nuts are promoted in this sales area of Seibu's main store, Ikebukuro.

ZAIRE IS POTENTIAL MARKET FOR U.S. FARM PRODUCTS

By ROSS L. PACKARD
U.S. Agricultural Attaché
Kinshasa

EXPORTERS IN THE United States may not be getting their share of Zaire's small but thriving agricultural import market. Shipments of U.S. farm products to Zaire are declining steadily, principally because of reduced participation in food assistance programs.

Trade prospects, however, are brightened by Zaire's ongoing dependence on food imports and familiarity with the quality of U.S. products. Also, a few products—such as rice—introduced under aid programs, are now achieving commercial success.

The Republic of Zaire—until 1960 the Belgian Congo—depends largely on agricultural imports to feed much of its urban population. Currently, the vast majority of food imports are from Europe—particularly, of course, Belgium—and trade practices favor European products. Preliminary research suggests, however, that traders and consumers are interested in U.S. goods if prices are competitive.

In 1971, U.S. farm exports to Zaire totaled $7.1 million, down slightly from 1970's $7.3 million. A decade ago, however, exports peaked at $21.5 million. In 1971, the United States share of the total Zairian market was 12 percent.

A variety of U.S. farm products are shipped to Zaire, but in fairly small quantities. They include the following:

- Tobacco is the most important cash crop sold to Zaire. Sales in 1971 reached $1.7 million, less than half of the $3.5 million in 1970. Flue-cured leaf (unstemmed) was the biggest item at $757,000, with burley leaf (unstemmed) next at $465,000. Also sold were dark-fired Kentucky and Tennessee leaf tobacco totaling $314,000, one-sucker leaf tobacco at $86,000, and Green River leaf tobacco at $42,000.
- Wheat flour sales total about $2 million annually, largely under P.L. 480. Although Zairian bakers like the quality of U.S. flour, current demands have been curtailed by high prices, largely due to shipping costs. Larger volume sales, enabling charter shipment, may lower rates. A new flour mill now being constructed at Matadi may create a market for U.S. wheat, since Zaire does not produce wheat for milling purposes.
- Rice, a popular U.S. product in Zaire, was introduced under P.L. 480 and is now sold commercially. In 1971, rice imports dropped to $407,000, less than half the 1970 level of $874,000.
- Nonfat dry milk shipments to Zaire in 1971 totaled over $1 million, but were principally for relief purposes. Dairy products are in short supply in Zaire, however, and market potential is good.
- Hop extract sales soared, with sales mounting from $15,000 in 1970 to $490,000 in 1971. Beer is a popular drink in Zaire and hop extract could become an important trade item.
- Livestock production has lagged in Zaire, but increasing awareness of a need for improving and establishing more stock could encourage sales of breeding cattle.
- The competitive market for poultry parts represents an area where U.S. sales may increase, although most poultry sold for meat consumption is imported from Europe at subsidized prices.

Further trade with Zaire requires a willingness by U.S. suppliers to further explore the market and promote their products. Although Zaire may never be a major U.S. market, business is available for those traders willing to take the initiative.

Fortunately, Zaire has not imposed many trade restrictions, although import taxes are high. However, recent balance of payments problems have resulted in reviewing import policies in order to maintain reserves. With vast deficits in consumer foods, however, Zaire will probably make curbs in other areas. Realistically, Zaire will not be able to discontinue food imports for some time, assuring a continuing market for agricultural products.

Zaire depends largely on agricultural imports to feed urban consumers.

CROPS AND MARKETS

Colombian-Venezuelan Trade Pact Reported

The Venezuelan and Colombian Governments have reportedly concluded a trade agreement covering agricultural products which one country has in excess but which is in short supply in the other. One of the items of primary import interest to Venezuela is cattle.

The pact will reportedly provide for importation of 5,000 head of Colombian cattle to help reduce Venezuela's deficit. It is expected that Venezuela will make future imports of additional cattle in its effort to reduce the illegal movement of animals into the country. Venezuela is also expected to import from Colombia black beans and certified seed.

Likely Venezuela exports to Colombia are sisal, sardines, and bright tobacco.

No Barter Now for Rice, Flaxseed, and Linseed Oil

Until further notice, no exports of U.S. rice, flaxseed, or linseed oil will be permitted under new barter contracts. An analysis of the world situation indicates that barter program assistance is not now needed for these commodities.

Relief Operations Continue in Fiji

Destruction by Hurricane Bebe left over 4,000 families homeless in Fiji, with vast quantities of crops and food supplies damaged. Thus far five governments, including the United States, and various nongovernmental agencies have provided emergency assistance.

Over 1,000 tons of wheat flour and vegetable oil have been committed under P.L. 480 Title II. In addition, the United States has allocated $750,000 in disaster contingency funds for tents, foodstuffs, and airlift operations.

Spain Reduces Import Duties

In an effort to restrain price rises, the Government of Spain has partially suspended import duties on a variety of farm commodities, effective until February 3, 1973. Included in the list are certain live cattle, some meat products, poultry meat and offals, various forms of prepared vegetables, crude and refined peanut oils, and certain condiments and tropical products.

Japan's Tariff Cuts Go Into Effect

The Japanese Parliament (Diet) has approved the 20-percent tariff reduction applicable to certain processed agricultural products and a wide range of manufactured goods. (See *Foreign Agriculture*, Nov. 13, 1972.) This action took effect on November 22, 1972.

Total Japanese imports in 1971 of agricultural products covered by the tariff decrease amounted to over $85 million, about one-fourth of which came from the United States. Items of principal trade interest to the United States included in the tariff reduction are fatty acids, essential oils, and certain canned fruits and vegetables.

A table listing the agricultural products covered by this action, the reduced tariff rates, and Japanese imports from the United States in 1971 has been published as an Agricultural Trade Policy circular, ATP 7-72. Copies are available from the Information Services Branch, FAS, USDA, Room 5918 So., Washington, D.C. 20250.

GRAINS, FEEDS, PULSES, AND SEEDS

Rotterdam Grain Prices and Levies

Current offer prices for imported grain at Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Dec. 27	Change from previous week	A year ago
	Dol. per bu.	*Cents per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 1 CWRS-14	3.22	−1	2.02
USSR SKS-14	(1)	(1)	1.89
Australian FAQ [2]	2.95	−3	1.66
U.S. No. 2 Dark Northern Spring:			
14 percent	2.95	−3	1.92
15 percent	2.98	−1	1.94
U.S. No. 2 Hard Winter:			
13.5 percent	2.95	−3	1.78
No. 3 Hard Amber Durum	3.01	+6	1.85
Argentine	(1)	(1)	1.81
U.S. No. 2 Soft Red Winter	(1)	(1)	1.74
Feedgrains:			
U.S. No. 3 Yellow corn	2.08	+1	1.43
Argentine Plate corn	2.34	−6	1.56
U.S. No. 2 sorghum	2.37	+18	1.52
Argentine-Granifero sorghum	2.37	+17	1.54
U.S. No. 3 Feed barley	1.89	+6	1.27
Soybeans:			
U.S. No. 2 Yellow	4.93	+2	3.33
EC import levies:			
Wheat [3]	[4] .91	+5	1.56
Corn [5]	[4] .76	+4	1.10
Sorghum [5]	[4] .50	−7	.95

[1] Not quoted. [2] Basis c.i.f. Tilbury, England. [3] Durum has a separate levy. [4] Effective October 14, 1971, validity of licenses with levies fixed in advance is a maximum of 30 days. [5] Italian levies are 21 cents a bu. lower than those of other EC countries. Note: Basis 30- to 60-day delivery.

Japan's Rice Surplus

Japan now plans to dispose of all but 600,000 tons of its surplus rice by mid-1974. It also plans to bring produc-

tion in balance with normal consumption needs to eliminate surpluses. In Japanese rice year 1972 (Nov.-Oct.) Japan intends to dispose of 1 million tons of rice in mixed feeds, 450,000 tons through exports, and 200,000 tons through industrial use. Recent price increases for feedgrains and a 450,000-ton shortfall in corn supplies from Thailand has led to pressure to release more surplus rice for feed.

Australia To Sell Bread By Metric Measure in 1973

Australia's baking industry expects to start selling bread by metric unit weights early in 1973 after the various States have passed necessary legislation. The change in bread weight units is part of the overall Australian program to convert to the metric system.

The country's program calls for the changes to be made over a period of years in three broad categories: Product weights, formulas and ingredient supplies, and temperature measurements and records.

Grain Exports and Transportation Trends: Week Ending December 15

Weekly export inspections of wheat, feedgrains, and soybeans totaled 1.69 million metric tons for the week ending December 15—a 14 percent drop from the high reached the week before, but still 9 percent above the November weekly average.

Inland transportation continued at a high level during the week, though below the previous week. Railcar loadings of grain totaled 31,616 cars, down 7 percent from the week before. Barge shipments of grain, at 377,000 metric tons, were down by 39 percent as ice in the upper Mississippi system began to affect water traffic.

GRAIN EXPORT AND TRANSPORTATION TRENDS: WEEK ENDING DECEMBER 15

Item	Week ending Dec. 15	Previous week	Weekly average, November	Weekly average, first quarter
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*
Weekly inspections for export:				
Wheat	447	773	542	414
Feedgrains	790	743	612	626
Soybeans	419	441	399	133
Total	1,686	1,957	1,553	1,173
Inland transportation:				
Barge shipments of grain	377	639	590	515
	Number	*Number*	*Number*	*Number*
Railcar loadings of grain	31,616	33,723	30,060	28,566

LIVESTOCK AND MEAT PRODUCTS

New Mexican Plant May Up Meat Exports to the United States

Mexican cattle industry spokesmen expect the southern State of Tabasco to continue to increase its livestock production in future years and a recently opened slaughterhouse in the city of Villahermosa may make possible larger exports of beef to the United States.

Most of Tabasco's current beef output is for the Mexico City market, although some of it gets into export channels from there. U.S. beef and veal imports from Mexico—mostly fresh, chilled, and frozen—have shown a general uptrend for at least the last 6 years. In 1966 they totaled 57.1 million pounds, rising to 79.1 million pounds in 1971.

The new slaughterhouse (Frigorifico y Empacadora de Tabasco) was opened in August by Tabasco ranchers, in cooperation with the Tabasco Cattlemen's Association. The plant, certified for export to the United States, has a total slaughtering capacity of 75 head per hour, but as late as October it was working at about half of its rated capacity.

The opening of the meat packing plant is the latest in a series of actions by Tabasco's cattlemen to up output. Many ranchers are improving pastures by planting pangola grass and there is a possibility they may open up fresh land for the extension of existing ranches or the establishing of new ones. The State also has abundant water and pastures are in good condition the year around, unlike the situation in most of Mexico's other meat producing States.

President Suspends 1973 Meat Quotas

As part of the Administration's continuing fight against inflation, the President has decided to suspend quotas on meat imports for 1973, according to an announcement by George P. Shultz, Secretary of the Treasury, on December 21, 1972.

"The vigorous growth of employment and income we foresee in 1973 will mean an increase in the demand for meat in this country, which despite an increase in meat production, will put upward pressure on meat prices. Suspension of the quotas is designed to moderate those inflationary pressures by encouraging increased imports of meat.

"This action demonstrates the President's firm determination to hold down the cost of food.

"This is the second time the President has taken such action. In June 1972, the President directed the removal of all restrictions on meat imports for the balance of the year. Since that time, some supplying countries have increased their shipments of meat to the United States, and we expect this trend will continue.

"We anticipate that this suspension of the quotas will continue throughout 1973. However, as required by law, the Secretary of Agriculture will review the situation every 3 months. Should marketing conditions change substantially, contrary to our present expectations, suspension of the quotas will be reconsidered.

"As the President stated in June, this action is not aimed at the American farmer. Cattle prices have been rising; they are presently about 7 percent above a year ago. Our purpose is to remedy a short-term shortage that is beyond the ability of our farmers to fill in 1973.

"All meat imports, of course, will be subject to the same high standards of sanitation that apply to domestically produced meat."

Korean and Japanese Firms To Boost Pork Exports

Korean pork exporters are promoting joint ventures with Japanese businessmen to increase production of frozen pork for export to Japan. The Ministry of Agriculture and Forestry

reports that at least four Korean and three Japanese companies are cooperating in three $100,000 programs.

In 1971, Korean exports of frozen pork to Japan were about 76 metric tons worth some $95,000. In the first 9 months of 1972, frozen pork exports—primarily to Japan—shot to 3,345 tons valued at $4.4 million. The Government goal for the entire year was $600,000.

DAIRY AND POULTRY

France Forms Egg Committee

On October 17, 1972, a new committee called the "Professional Committee for Eggs (CPO)," was founded in France to regroup the country's main egg producers and trade associations. The role of the new committee is to forecast production and egg demand in France; and take all actions necessary to regularize the market.

The new committee is composed of four associations: French Poultry Producers' Federations (CFA); National Federation of Poultry Cooperatives (FNCA); National Syndicate of Packing Centers (SNICOC); and National Syndicate of Egg Product Industries (SNIPO).

At its first meeting, the committee agreed to create an egg stabilization fund; arrange for contracts between producers and end users; and to work for modifications in EC regulations covering egg production and sales.

CCC Sells Butter for Export

In early December, the Commodity Credit Corporation sold 1.1 million pounds of butter to U.S. exporters for shipment to Canada. Selling at 54 cents per pound, this was the first export butter sold from CCC stocks since June 23, 1972.

Approximately 141 million pounds of butter have been sold from CCC stocks for export since the inception of the program in May 1971.

Canadian Provincial Marketing Boards Sign Egg Agreement

A Canadian agreement, designed to provide for the "orderly marketing and management" of Canada's egg supply, advanced one step further recently when Provincial marketing organizations and egg producer boards signed the National Egg Marketing Plan. Provincial ministers had signed the pact earlier and Newfoundland was still studying it.

Paul Babey, chairman of the National Farm Products Marketing Council, predicted the plan would be in operation before the end of 1972, and that other commodities might be governed by similar agreements in the future. Already a national marketing plan has been proposed by turkey producers.

The United States has expressed its concern on several occasions to Canadian officials that a supply-management type marketing board would interfere with imports and has been assured by Canada that they would uphold their international commitments including those under the General Agreement on Tariffs and Trade (GATT). The Canadian tariff on eggs in the shell at 3.5 cents per dozen is bound in the GATT.

Hatching eggs, which account for the bulk of U.S. egg exports to Canada, will be excluded from marketing controls. The press release accompanying the announcement noted that the Egg Plan would improve export sales efforts.

PEIA Holds Three Food Shows in Japan

Shown examining a frozen turkey breast is one of approximately 2,500 institutional buyers, chefs, food managers, and industrial suppliers who attended three food shows held recently in Japan by the Poultry and Egg Institute of America and USDA's Foreign Agricultural Service. Held in Sapporo, Sendai, and Osaka, the shows featured over 40 U.S. food products. Chicken rolls and turkey stroganoff were the most popular of the dishes featured.

FRUITS, NUTS, AND VEGETABLES

U.K. Grapefruit Imports From the Dollar Area

On November 15, 1972, the U.K. Department of Trade and Industry announced that the quota for imports of fresh grapefruit from the dollar area will be about $2.7 million c.i.f. for 10 months December 1, 1972-September 30, 1973. This quota is the same as it was in 1971-72. No licenses are issued for the months October and November for imports from the dollar area.

At the same time it was announced that a separate quota for imports of fresh grapefruit from Cuba for the 12-month period January 1-December 31, 1973, will be $164,000 c.i.f.

SUGAR AND TROPICAL PRODUCTS

No Coffee Export Quotas During January-September 1973

For the first time in 9 years, there are to be no coffee export quotas (although trade will be monitored) under the International Coffee Agreement, beginning January 1, 1973.

The action came as the 62-member Coffee Council, meeting in London, December 4-11, failed to agree on trigger prices for increases or withdrawals and the timing and amounts of quota changes.

Earlier it had been decided that 1972-73 (October-September) export quotas would total 49.6 million bags, with quotas being set at 13.1 million bags for the first quarter of the coffee year. However, action to confirm or change quotas for the last 9 months of the year had to be taken prior to December 10, 1972, and no agreement was reached by the deadline.

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Canadian Outlook Conference (Continued from page 6)

is expected for 1973. Acreage of flue-cured tobacco in 1973 could equal or exceed this year's area. Acreage of cigar filler and burley is slated to remain at current levels.

Other products. Generally, grower returns from the 1972 sugarbeet crop should equal or exceed returns for the 1971 crop. Prices to producers of honey and maple syrup are also projected to climb.

While the demand for dry beans will remain fairly strong for the next year or so, competition for export markets will be keen due to larger U.S. supplies. Substantially reduced production of dry peas in North America this season could mean that supplies can be brought to more manageable proportions. If demand continues at recent levels, there should be some price improvement in 1973.

Heavy stocks of buckwheat are keeping prices down.

In concluding the conference, Chairman Williams suggested that participants assess and identify the reasons for current optimism in an effort to sustain and consolidate farm gains. Citing factors which brought about Canada's improved agricultural situation, he discussed the strong and expanding economy, strengthened foreign and domestic markets, and actions by Federal and Provincial Governments. He expressed the hope that Canada's 1972 Outlook Conference had helped to identify opportunities for 1973.

World Tea Supplies Increase *(Continued from page 8)*

of 103 million pounds and well above the 1960 level of 86 million. In addition, it is estimated that institutional or out-of-home use of tea now amounts to another 30 million pounds or so annually, placing total U.S. consumption in 1971 at an alltime high of 160 million pounds. Consumption in 1972 is expected to be even higher.

Although U.S. consumption is increasing, the annual per capita rate still remains less than one pound, compared with a U.K. rate of over 8 pounds.

The introduction of instant tea and instant tea mixes, which have sugar and flavor added, has played a major role in expanding U.S. consumption.

Instants in 1971 captured a 38 percent share of retail sales, compared with a 23 percent share in 1965 and less than 5 percent in 1960. Although tea bags still retain the largest share of sales with a 51 percent share in 1971, loose tea sales plummeted to only 11 percent of the total in 1971 from a 59 percent share in 1950.

Future U.S. marketing prospects for tea continue to look bright, and there is still potential for expansion in the European Community (EC) as well.

In the meantime, many producing countries are tightening their belts as profit margins remain under pressure from declining world prices, high internal producer taxes and levies, and rising labor costs.

TEA EXPORT QUOTAS

[In thousands of metric tons]

Country	1972-73 [1]	1973-74 [2]
India	211.5	217.8
Sri Lanka	208.6	214.2
Kenya	45.5	51.0
Indonesia	42.2	43.2
Bangladesh	26.2	26.0
Argentina	25.4	28.8
Uganda	21.1	23.7
Malawi	19.9	20.7
Mozambique	17.7	18.8
Zaire	13.2	14.1
Tanzania	9.5	10.2
Brazil	4.6	4.9
Mauritius	4.6	4.8
South Vietnam	1.6	1.8
Burundi	.5	.6
Total	652.1	680.6
Global quota [3]	619.0	645.0

[1] Year ending March 31, 1973. [2] Provisional. [3] Adjusted less 5 percent for expected shortfall.